

# UniSA Research Metadata System

## **USER MANUAL**

**Version 1.0  
16 June 2013**

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# **1. Introduction**

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## **1.1. About this guide**

This document explains how to use the Research Metadata System. It is a step by step guide on how to create quality Collection metadata ready for harvest by Research Data Australia.

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## **1.2. About the Research Metadata System**

The Research Metadata System is an enterprise metadata store that aims to be an enabler of complete, high quality, compliant and accessible metadata for research activities, and will facilitate ongoing contribution to the ARDC(Australian Research Data Commons) repositories, allowing discovery, reporting and reuse of research activities.

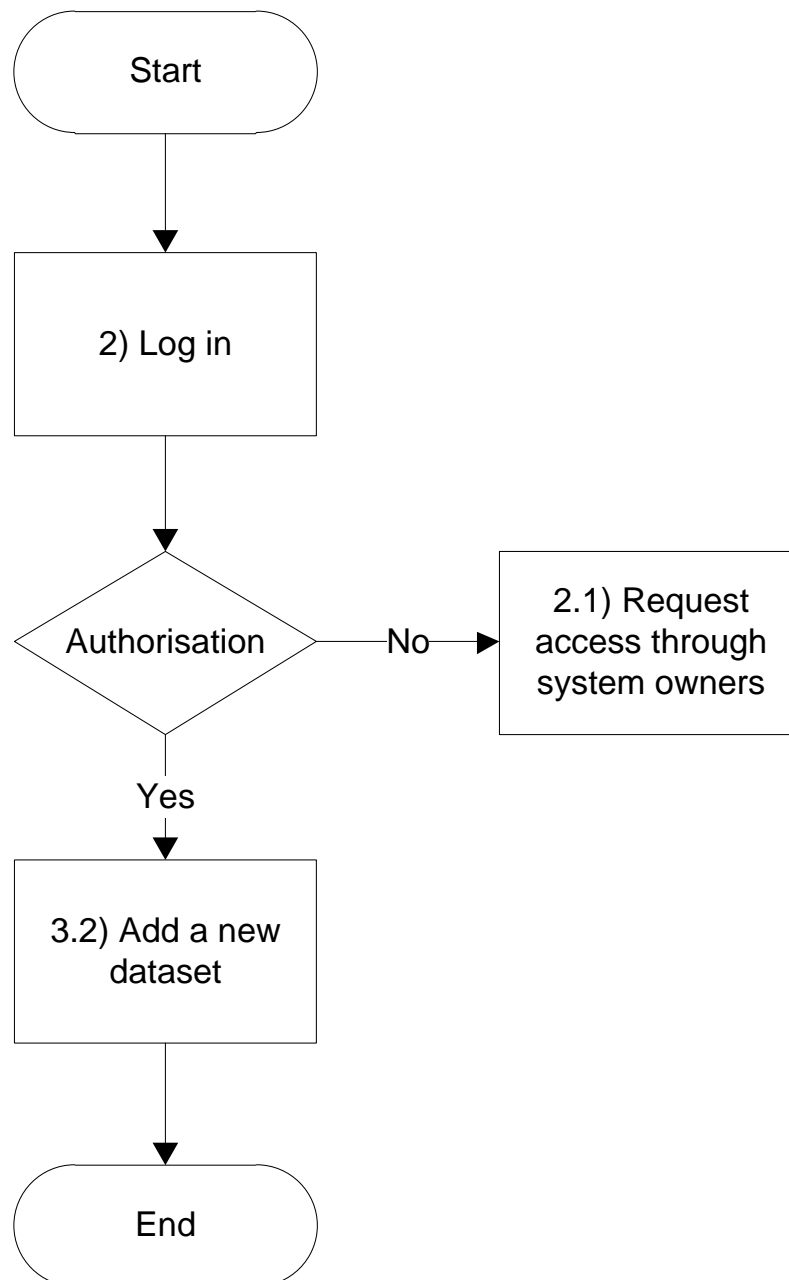
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## 1.3. Workflow

The following diagram provides an overview of the workflow for adding a new collections. The numbers to the left of each process correspond to a section number in this guide.

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### 1.3.1. Creating a new collection



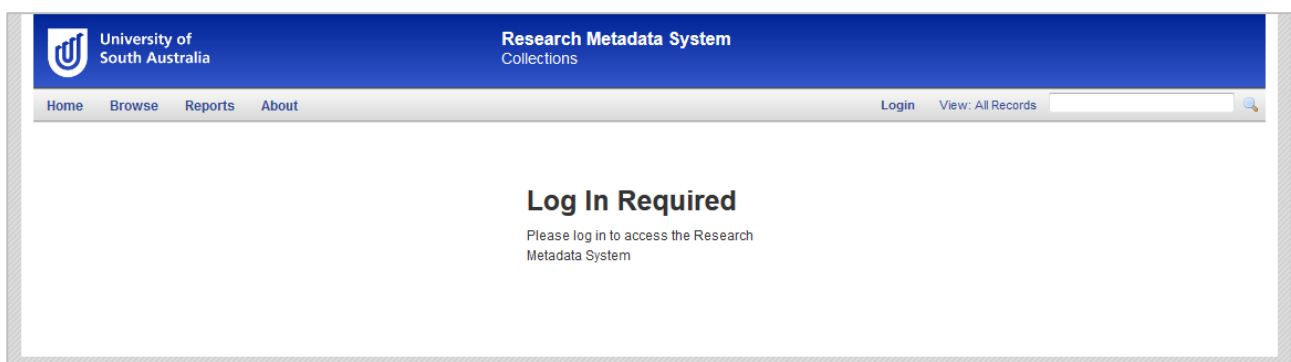
## 2. Accessing the Research Metadata System

### 2.1. Authorising access

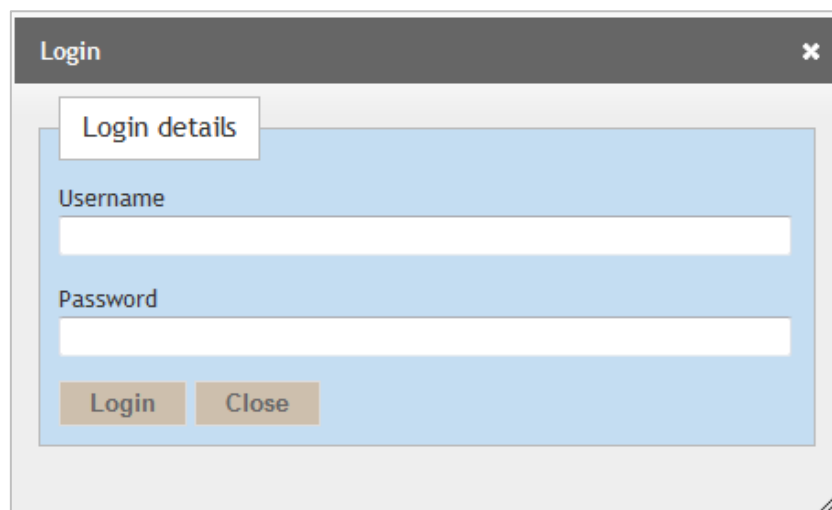
Access is granted by contacting the system owners.

### 2.2. Accessing the Research Metadata System

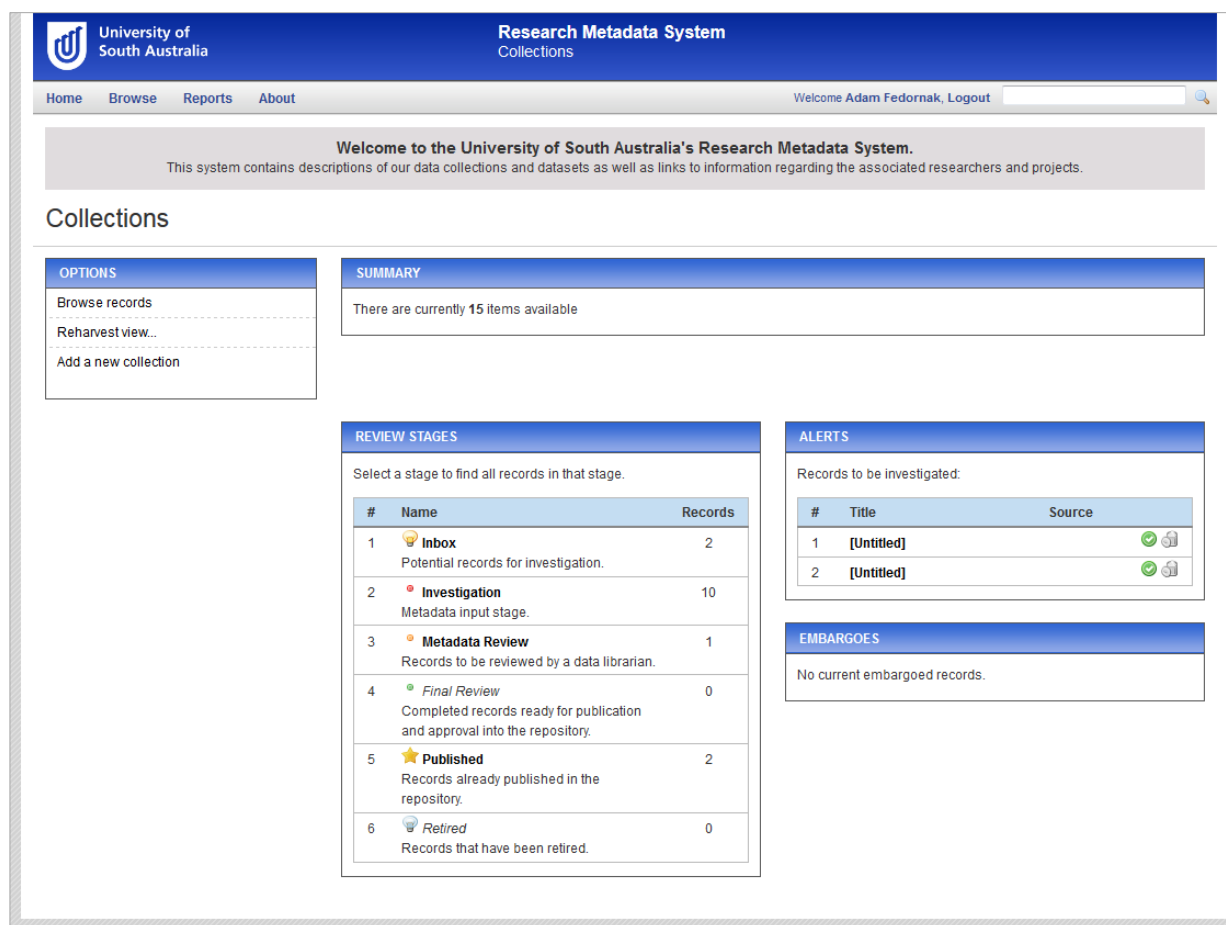
1. Open your web browser. Mozilla Firefox is recommended for this application.
2. Type the URL (<https://localhost/redbox>) of the site into the address bar of your browser. The following screen should appear:



3. Click on the **Login** link at the top right. The following window will appear:



4. Enter your login details and click the **Login** button. Upon successful login the following screen will appear:



**University of South Australia** Research Metadata System Collections

Home Browse Reports About Welcome Adam Fedornak, Logout

Welcome to the University of South Australia's Research Metadata System.  
This system contains descriptions of our data collections and datasets as well as links to information regarding the associated researchers and projects.

### Collections

**OPTIONS**  
Browse records  
Reharvest view...  
Add a new collection

**SUMMARY**  
There are currently **15** items available

**REVIEW STAGES**  
Select a stage to find all records in that stage.

#	Name	Records
1	<b>Inbox</b> Potential records for investigation.	2
2	<b>Investigation</b> Metadata input stage.	10
3	<b>Metadata Review</b> Records to be reviewed by a data librarian.	1
4	<b>Final Review</b> Completed records ready for publication and approval into the repository.	0
5	<b>Published</b> Records already published in the repository.	2
6	<b>Retired</b> Records that have been retired.	0

**ALERTS**  
Records to be investigated:

#	Title	Source
1	[Untitled]	
2	[Untitled]	

**EMBARGOES**  
No current embargoed records.

Alternatively, if you do not have access to the system or use invalid credentials, the login window will display an invalid username/password error. cf. Section 2.1 for how to gain access.

## 2.3. Access levels

The Research Metadata System supports four levels of access.

Level of access	Available functionality	Typical users
Administrator	Read and write access to public and private records. Access to system administration functions.	System owners
Reviewer	Read and write access to public and private records.	Research Administrators
Librarian	Read and write access to records up to the 'Final Review' stage, read only access thereafter.	Metadata Librarian
Guest	Read access to public records.	Nominated staff

## 3. Adding a new Collection metadata record

### 3.1. Overview

If you have logged in, the following screen should appear. If it does not then you do not have the appropriate access (cf. Section 2.1) or have not logged in (cf. Section 2.2).

The screenshot displays the 'Research Metadata System Collections' interface. At the top, there is a blue header with the University of South Australia logo and the system name. Below the header is a navigation bar with links: Home, Browse, Reports, About. A user greeting 'Welcome Adam Fedornak, Logout' is visible on the right. A central banner welcomes users to the system and states it contains descriptions of data collections and datasets. The main content area is titled 'Collections' and includes several panels:

- OPTIONS**: A sidebar with links: 'Browse records', 'Reharvest view...', and 'Add a new collection'.
- SUMMARY**: A box stating 'There are currently 15 items available'.
- REVIEW STAGES**: A section titled 'Select a stage to find all records in that stage.' containing a table with 6 stages:
 

#	Name	Records
1	<b>Inbox</b> Potential records for investigation.	2
2	<b>Investigation</b> Metadata input stage.	10
3	<b>Metadata Review</b> Records to be reviewed by a data librarian.	1
4	<b>Final Review</b> Completed records ready for publication and approval into the repository.	0
5	<b>Published</b> Records already published in the repository.	2
6	<b>Retired</b> Records that have been retired.	0
- ALERTS**: A section titled 'Records to be investigated:' containing a table with 2 entries:
 

#	Title	Source
1	[Untitled]	[Green checkmark icon]
2	[Untitled]	[Green checkmark icon]
- EMBARGOES**: A box stating 'No current embargoed records.'

## 3.2. Adding a new Collection

1. Make sure you are on the home page of the Collections section. To get there, click on the **Collections** link on the **Browse** list at the top left of the page.

**University of South Australia Research Metadata System Collections**

Home Browse Reports About Welcome Adam Fedornak, Logout

Welcome to the University of South Australia's Research Metadata System.  
This system contains descriptions of our data collections and datasets as well as links to information regarding the associated researchers and projects.

### Collections

**OPTIONS**  
Browse records  
Reharvest view...  
Add a new collection

**SUMMARY**  
There are currently 15 items available

**REVIEW STAGES**  
Select a stage to find all records in that stage.

#	Name	Records
1	<b>Inbox</b> Potential records for investigation.	2
2	<b>Investigation</b> Metadata input stage.	10
3	<b>Metadata Review</b> Records to be reviewed by a data librarian.	1
4	<b>Final Review</b> Completed records ready for publication and approval into the repository.	0
5	<b>Published</b> Records already published in the repository.	2
6	<b>Retired</b> Records that have been retired.	0

**ALERTS**  
Records to be investigated:

#	Title	Source
1	[Untitled]	
2	[Untitled]	

**EMBARGOES**  
No current embargoed records.

2. Click on the **Add a new collection** link in the options menu on the left.
3. You will be taken to the Metadata Record workflow (cf. Section 3.2.1).

**Note:** Progress through the workflow can be made by clicking on the tab names at the top or by using the left and right arrow buttons at the bottom left. Progress can be saved at any time via the **Save** and **Save and Close** buttons at the bottom left of the screen.

**Note:** Fields names with an asterisk (\*) next to them are mandatory and must be filled in before the collection can be submitted.

**Help:** Clicking on the icon next to a field name will bring up a tooltip, e.g.  
Electronic addresses

The electronic address of the collection, e.g. a URL to a repository containing the collection or the email address of a contact person to request access to the collection.



### 3.2.1. General

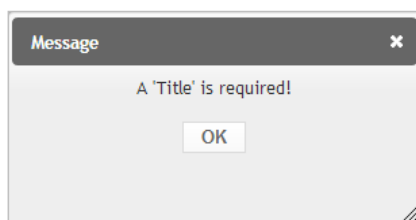
The screenshot shows the 'Research Metadata System Collections' interface. At the top is a blue header with the University of South Australia logo and navigation links: Home, Browse, Report, About. A user login bar shows 'Welcome Adam Fedornak, Logout'. The main section is titled 'Metadata Record' and contains a tabbed interface for an 'Investigation'. The 'General' tab is active, showing a 'General information about the data.' section with the following fields:

- Primary title (\*)**: A text input field containing 'Test Entry'.
- Abbreviated title**: A text input field containing 'abbreviated title of research data'.
- Alternative title**: A text input field containing 'alternative title of research data'.
- Type (\*)**: A dropdown menu with 'Collection' selected and a 'change' link.
- Date Record Created**: A date input field showing '2013-05-08'.
- Date Record Modified**: A date input field showing '2013-05-09'.

At the bottom of the form are navigation buttons: '< >' (back/forward), 'Save', and 'Save and close'. A 'View record' link is located in the top right corner of the form area.

1. Type a unique title that will be used to identify the collection.
2. Optionally, type an abbreviated title.
3. Optionally, type an alternative title. If acronyms were used in the primary title, it is recommended that they be spelled out in full in the alternative title.
4. Select what type of collection is being described from the **Type** list.

**Warning:** Attempting to progress through the workflow without defining a primary title will result in the following error popup:



### 3.2.2. Description

1. Click the **Description** link on the blue bar at the top of the workflow to progress to the next page, or click on the next icon (➡) at the bottom left of the screen.

The screenshot shows the 'Metadata Record' page in the Research Metadata System. The top navigation bar includes the University of South Australia logo, 'Research Metadata System Collections', and a user welcome message 'Welcome Adam Fedornak, Logout'. Below this is a secondary navigation bar with links: Home, Browse, Report, About. The main content area is titled 'Metadata Record' and features a tabbed interface with tabs: General, Description (selected), Location, Coverage, People, Subject, Rights, Management, Attachments, Notes, Citations, and Submit. A 'View record' link is in the top right. The 'Description' tab contains a text area for 'Descriptive information about the data and the data's relationship with any activities, collections and services.' Below this is a table for 'Description (\*)' with columns '#', 'Type', and 'Description'. The first row shows a description: 'eg. This dataset contains observational data and calibration files.' Below the table is an 'Add description' button. Further down are sections for 'Related Activities', 'Related Collection', and 'Related Services', each with a table for adding related items. Each table has columns for '#', 'Relationship', 'UniSA [Activity/Collection/Service]', 'Identifier', and 'Title'. There are 'Add Activity', 'Add Collection', and 'Add Service' buttons respectively. At the bottom left are navigation icons (back, forward) and 'Save' and 'Save and close' buttons.

2. Type a description of the collection. Multiple types of description can be attached to the metadata record.
3. Describe any related activities, collections or services:
  - a. Select how the collection is related to the activity, collection or service.
  - b. If the related activity, collection or service belongs to your home institution, tick the checkbox.
  - c. Type the title of the related activity, collection or service. Note that if the activity, collection or service has been identified as belonging to your home institution, typing in the field will search for the entered value. This allows for the automatic completion of the title and identifier fields. Otherwise these must be manually entered.
  - d. If it is not your home institution activity, collection or service, manually type the title and the identifier.

- e. Repeat steps a through d, to add more activities, collections and services, as necessary.
1. Click the **Add address** button to add another address part, and repeat step five as necessary.

### 3.2.3. Location

1. Click the **Location** link on the blue bar at the top of the workflow to progress to the next page, or click on the next icon (➡) at the bottom left of the screen.

The screenshot shows the 'Metadata Record' page for an 'Investigation'. The 'Location' tab is selected. Below the tab bar, there's a description: 'Electronic or physical address for the data.' The 'Electronic addresses' section has a table with one row. The 'Type' dropdown is set to 'Please select one...'. The 'Value' field is empty. Below the table is an 'Add electronic address' button. The 'Physical addresses' section also has a table with one row. The 'Type' dropdown is set to 'Please select one...'. The 'Value' field is empty. Below the table is an 'Add physical address' button. At the bottom of the page are navigation buttons: a back arrow, a forward arrow, 'Save', and 'Save and close'.

2. Select the type of Electronic address from the **Type** list.
3. Type a value for the electronic address in the **Value** field. Ensure the entered value matches the type of electronic address, e.g. For an address of type email, the value should be in the format test.address@example.com
4. Select the type of Physical address from the **Type** list.
5. Construct the physical address:

**Note:** Physical addresses are constructed using address parts. For example, a physical address might consist of multiple address lines and a telephone number.

- a. Select the type of address part from the **Type** list.
- b. Type a value for the address part in the **Address part** field.
6. Click the **Add address** button to add another address part, and repeat step five as necessary.

### 3.2.4. Coverage

1. Click the **Coverage** link on the blue bar at the top of the workflow to progress to the next page, or click on the next icon (➡) at the bottom left of the screen.

University of South Australia Research Metadata System Collections

Home Browse Report About Welcome Adam Fedornak, Logout

## Metadata Record

Investigation View record

General Description Location Coverage People Subject Rights Management Attachments Notes Citations Submit

Includes geolocation coverage and data collection time period.

### Coverage

Temporal coverage

1 Date

from eg. 1990 to eg. 2010

Add Date

Detail

eg. 21st Century, WWII, The Depression, etc.

Add detail

Add coverage

### Geospatial Location

Map Credits: Data CC-BY-SA by OpenStreetMap








Find location: Place name

Type	Value
1 Please select one...	eg. coordinates or placename

Add location

Save Save and close

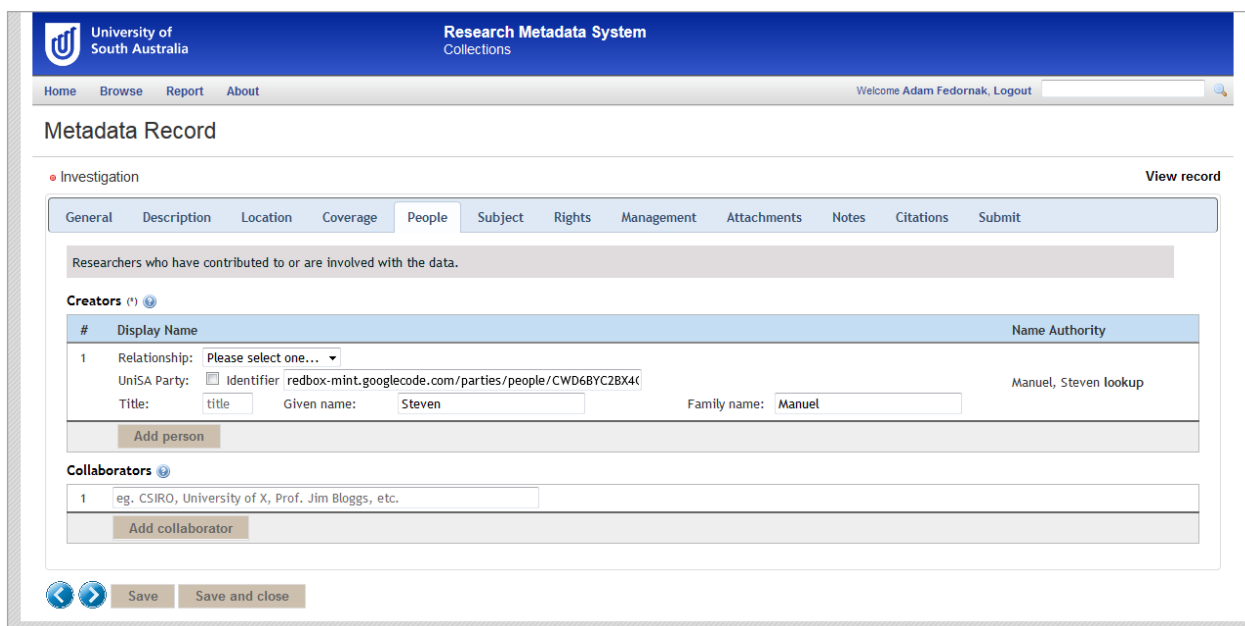
2. Type a date range relevant to the collection. This is either done by using the date picker associated with each text box or by manually typing the year.
3. Type a time period relevant to the collection. This could be something like “World War 2” or “Ancient Egypt”.
4. Add a geospatial location to the record by using the map tools on the embedded map in the Geospatial location section. The following table describes what each control does:

	Navigate around the map by holding down the left mouse button and dragging.
	Create a point where the mouse is clicked.
	Draw a path by clicking on the map for each point. Double click to finish the path.
	Draw a square on the map.
	Draw a circle on the map.
	Draw a polygon on the map.
	Click on a shape and then move the handles to modify the shape.

**Note:** For a map display to be generated in Research Data Australia, it is recommended that the co-ordinate type be either set to DCMI Box notation for shapes, or DCMI Point notation for points. Co-ordinate format can be selected in the list next to the co-ordinates.

### 3.2.5. People

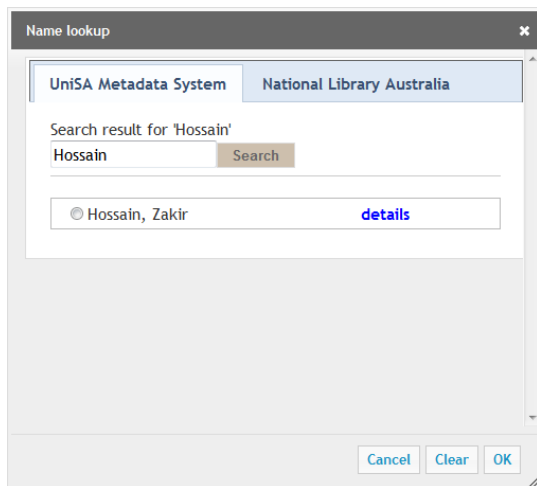
1. Click the **People** link on the blue bar at the top of the workflow to progress to the next page, or click on the next icon (➡) at the bottom left of the screen.



The screenshot shows the 'People' tab of the 'Metadata Record' workflow. The header includes the University of South Australia logo and the 'Research Metadata System Collections' title. A navigation bar at the top contains links: Home, Browse, Report, About, and a user status bar showing 'Welcome Adam Fedornak, Logout'. The main content area is titled 'Metadata Record' and shows the 'Investigation' record. A tabbed interface at the top of the record includes: General, Description, Location, Coverage, **People**, Subject, Rights, Management, Attachments, Notes, Citations, and Submit. The 'People' tab is active, displaying a section for 'Researchers who have contributed to or are involved with the data.' Below this is a 'Creators' section with a table for adding people. The table has columns for '#', 'Display Name', and 'Name Authority'. The first row shows a relationship with 'UnISA Party' checked, an identifier 'redbox-mint.googlecode.com/parties/people/CWD6BYC2BX4', and a 'Manuel, Steven lookup' authority. Below the table are fields for 'Title' (with a dropdown), 'Given name' (Steven), and 'Family name' (Manuel). There is an 'Add person' button. Below the creators section is a 'Collaborators' section with a text input field containing 'eg. CSIRO, University of X, Prof. Jim Bloggs, etc.' and an 'Add collaborator' button. At the bottom left, there are navigation arrows and 'Save' and 'Save and close' buttons.

2. Select how the collection is related to the person from the **Relationship** list.
3. If the person is from local institution, tick the **party** checkbox.
4. Type the person's details in the **Title**, **Given name** and **Family name** fields.

5. Click the **lookup link**. The following screen should appear:



The image shows a 'Name lookup' dialog box. At the top, there are two tabs: 'UniSA Metadata System' (selected) and 'National Library Australia'. Below the tabs, it says 'Search result for 'Hossain''. There is a text input field containing 'Hossain' and a 'Search' button to its right. Below this, there is a list of search results. The first result is 'Hossain, Zakir', which is preceded by a radio button (which is selected) and followed by a 'details' link. At the bottom of the dialog box, there are three buttons: 'Cancel', 'Clear', and 'OK'.

6. If necessary, change the name authority by clicking on the respective tabs at the top of the window.
7. Click on the radio button to the left of the person's name, and then click the **OK** button.
8. If no identifier was automatically added, please type an identifier into the **Identifier** field.
9. Name the other collaborators in the research project by typing a value into the **Contributor's Name** field.
10. For each contributor name, please type a unique identifier into the **Identifier** field.

### 3.2.6. Subject

1. Click the **Subject** link on the blue bar at the top of the workflow to progress to the next page, or click on the next icon (➡) at the bottom left of the screen.

The screenshot shows the 'Subject' tab of the 'Metadata Record' form. The form is titled 'Investigation' and includes a 'View record' link. The 'Subject' tab is selected, showing fields for 'Topic that the data is about.', 'Fields of Research', 'Socio-Economic Objective', 'Keywords', 'Type of Research Activity', and 'Other classifications'. The 'Fields of Research' field is expanded, showing a list of codes and a 'Select' button. The 'Other classifications' section contains a table with columns for '#', 'Classification scheme', 'Term Identifier', and 'Subject'.

#	Classification scheme	Term Identifier	Subject
1	Other scheme	Identifier	Subject

2. Select the field of research from the list, and then click the **Select** button to save the two, four or six digit FOR code.

This close-up shows the 'Fields of Research' dropdown menu. It displays a list of codes and their corresponding field names: '01 - Mathematical Sciences', '0102 - Applied Mathematics', and '010202 - Biological Mathematics'. A 'Select' button is visible to the right of the list.

3. Select the socio-economic objective code from list, and then click the **Select** button to save the two, four or six digit SEO code.
4. Type any descriptive keywords that help describe the data, in terms of subject area.
5. Select the type of research activity from the **Type of Research Activity** list, and then click the **Add activity type** button.
6. Type the name of an alternative classification scheme into the **Other scheme** field.
7. If available, type a term identifier that uniquely identifies the subject term in the scheme's vocabulary.
8. Type the name of the subject, and then click the **Add subject** button.

### 3.2.7. Rights

1. Click the **Rights** link on the blue bar at the top of the workflow to progress to the next page, or click on the next icon (➡) at the bottom left of the screen.

University of South Australia Research Metadata System Collections

Home Browse Report About Welcome Adam Fedornak, Logout

## Metadata Record

Investigation View record

General Description Location Coverage People Subject Rights Management Attachments Notes Citations Submit

Rights, licences and access rights for the data.

Access/Rights (\*)

1

**Access Rights/Conditions**  
e.g. Contact Chief Investigator to negotiate access to the data. URI: Access Rights URI

**Rights**  
e.g. This dataset is made available under the Public Domain Dedication a URI: Rights Statement URI

**Licence**  
Please select one...

**Licence - Other**

Name: license name  
URL: license url

Add rights

Save Save and close

2. Specify access rights/conditions that apply to this collection such as access restrictions or embargoes
3. Specify information about rights held in and over the collection, such as copyright, licenses and other intellectual property rights.

**Note:** At minimum, either the **Access Rights/Conditions** or **Rights** fields must be filled in.

4. Select a data licence from the **Licence** list. If the data licence is not in the list, manually specify an alternative in the **Licence – Other** field set, including the license name and license URL.



### 3.2.8. Management

1. Click the **Management** link on the blue bar at the top of the workflow to progress to the next page, or click on the next icon (➡) at the bottom left of the screen.

The screenshot shows the 'Management' tab of a 'Metadata Record' in the Research Metadata System. The interface includes a top navigation bar with the University of South Australia logo and 'Research Metadata System Collections'. Below this is a secondary navigation bar with links: Home, Browse, Report, About, and a user welcome message 'Welcome Adam Fedornak, Logout'. The main content area is titled 'Metadata Record' and features a tabbed interface with 'Investigation' selected. The 'Management' tab is active, displaying various fields for managing the record's identifiers and metadata.

**Management information including unique identifiers that are linked to the data.**

**Identifier (\*)**

Type of identifier: Please select one...

Identifier: persistent-identifier ☒ Use this record's ID

**Additional identifier**

#	Type	Identifier
1	Type of identifier...	persistent identifier

**Retention Period (\*)**

Please select...

**Extent or Quantity (\*)**

quantity

**Disposal Date**

disposal date

**Related Groups**

1	Relationship	Please select one...
	UniSA Group	<input type="checkbox"/> Identifier title
	Title	title

**Funding Body/s**

1	Funding body
---	--------------

**Data Size**

size

**Institutional Data Management Policy**

title, version number and date of policy

**Data Management Plan**

☐ Yes ☐ No

**Notes**

notes

**Discipline repositories**

1	Please select one...
---	----------------------

Navigation icons: ⏪ ⏩

2. Type an identifier for the collection. By default, the system will generate an appropriate identifier. Alternatively, type an explicit identifier that meets the standards defined in the ANDS controlled vocabulary:  
[http://services.ands.org.au/documentation/rifcs/1.3/vocabs/vocabularies.html#Identifier\\_Type](http://services.ands.org.au/documentation/rifcs/1.3/vocabs/vocabularies.html#Identifier_Type)
3. Type any additional identifiers for the collection.

4. Record the period of time that the data must be retained.
5. Type the number of files in the collection, and the format. e.g. 20 word documents, 5 csv files.
6. Select a disposal date for the data, if applicable.
7. Select the relationship between this record and related groups from the **Relationship** list.
  - a. If this is a group, click the **Group** checkbox. Otherwise, input the party's unique identifier into the **Identifier** text box.
  - b. Input the title of the group into the **Title** text box.

**Note:** If the **party** checkbox is ticked, typing in the **Title** text box will search for groups.  
Clicking on a search result will add the Identifier of the group to the **Identifier** field.

8. Type the name of the research funding body. The value will be searched for as you type.
9. Record the size of the data in kilobytes, megabytes, gigabytes etc.
10. Record the title, version number and date of an associated institutional data management policy.
11. Specify whether a data management plan is available.
12. Include the collection in one or more sets, to enable this metadata to be selectively harvested.

### 3.2.9. Notes

1. Click the **Notes** link on the blue bar at the top of the workflow to progress to the next page, or click on the next icon (➡) at the bottom left of the screen.

The screenshot displays the 'Metadata Record' interface. At the top, there's a navigation bar with 'Home', 'Browse', 'Admin', 'Reports', and 'About'. A 'Welcome Adam Fedornak, Logout' message is on the right. The main heading is 'Metadata Record'. Below it, a 'Published' status is shown. A horizontal menu includes 'General', 'Description', 'Location', 'Coverage', 'People', 'Subject', 'Rights', 'Management', 'Notes' (selected), 'Citations', and 'Submit'. A 'View record' link is on the far right. The 'Notes' section has a heading 'Notes' and a table with one row for note '1' with the text 'description'. Below this is an 'Add note' button. The 'Related information' section has a heading 'Related information' and a table with one row for related information '1'. This row has fields for 'Type' (a dropdown menu), 'Identifier' (a dropdown menu), 'Title' (a text box), and 'Note' (a text box). Below this is an 'Add related information' button. At the bottom, there are navigation buttons: a left arrow, a right arrow, 'Save', and 'Save and close'.

2. Type a note into the **Note** text box.
3. Click the Add note button.
4. Select the type of related information from the **Type** list.

5. Select the type of identifier from the **Identifier** list.
6. Input the identifier into the **Identifier** field.
7. Input the title of the related information into the **Title** field.
8. Input any notes into the **notes** text box.
9. Click the **Add related information** button.

### 3.2.10. Citations

1. Click the **Citations** link on the blue bar at the top of the workflow to progress to the next page, or click on the next icon (➡) at the bottom left of the screen.

University of South Australia Research Metadata System Collections

Home Browse Report About Welcome Adam Fedornak, Logout

## Metadata Record

Investigation View record

General Description Location Coverage People Subject Rights Management Attachments Notes Citations Submit

Information about your research data source.

### Citation Information

PREFILL\* Render Citation

\* NOTE: This will overwrite any values that may have been typed below using data from elsewhere in the form.

Citation sent to RDA:  
▲ Please use the 'Render Citation' button when your citation metadata has been entered below.

☒ No citation

☐ Full citation

A full citation string goes here.

Citation Style: Harvard change

☐ Citation Metadata

Identifier: ☐ Use the identifier provided during curation ☐ Use the following identifier please select one...

Title (\*): Title

Creators (\*):

Title	Given Name	Family Name
1 Title	Given Name	Family Name

Add Contributor

Edition: Edition

Publisher (\*): Publisher

Place of Publication: Place of Publication

Date(s): Add Date

URL (\*): URL

Context: Citation Context

Save Save and close

There are three ways to specify how the collection should be cited:

1. No citation. You can opt not to provide any citation information.

2. Fill in each citation metadata field individually.
  - a. Click the **Render Citation** button to preview the citation that will be sent to Research Data Australia.
3. Click the Prefill button to automatically fill in the individual citation fields with data from the workflow.


**Note:** Clicking the prefill button will overwrite any values that have been typed manually.


### 3.2.11. Submit


1. Click the **Submit** link on the blue bar at the top of the workflow to progress to the next page, or click on the next icon (➡) at the bottom left of the screen.

2. To place the record under embargo
  - a. Select the checkbox next to **Embargo this record**
  - b. Specify a date that this embargo will end on.
  - c. Type a short description of the embargo and why it is in place in the **Embargo note** box
3. To progress the record:

- a. Click the **Progress** checkbox. If there are any required fields missing, the following red text will appear:

The following items require further actions before you can proceed:  
A Creators Given or Family name' is required! 

- b. Click on the  icon to jump to the missing field. The required field will have a description next to it in red text detailing what information is required.
  - c. Once all missing fields have been filled in, click the **Proceed** button.
4. To delete the record

**Delete** 

☐ I understand that deleting this record is permanent and cannot be undone. Delete

- a. Click the **Delete** checkbox.
- b. Click the **Delete** button.